



Westpac KiwiSaver Scheme Switch Form

This form allows you to switch your existing investments to a different investment option(s) and/or change the investment option where your future contributions to the Westpac KiwiSaver Scheme will be invested.

A: Your Details

Westpac KiwiSaver Scheme Member number

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Mr Mrs Miss Ms

Other (please specify)

Given name(s)

Surname

IRD number

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Phone numbers

HOME:	AREA CODE
BUSINESS:	AREA CODE
MOBILE:	AREA CODE

Best time to contact you

HOME:	AM/PM	WORK:	AM/PM
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Postal address

NUMBER & STREET/BOX NUMBER	
SUBURB	
TOWN/CITY	POSTCODE

Email address

Prescribed Investor Rate

10.5% 17.5% 28%

B: Existing Investment

If you do not wish to switch your existing investments, but would like to change the investment strategy for your future contributions, **proceed to section C.**

I would like to switch my existing investments into the Capital Protection Plan (CPP)

OR

I would like to switch my existing investments into the investment option(s) indicated in the table below (subject to terms and conditions set out in the notes)

If you have any investments in CPP Funds please complete the following, if not proceed to the table below

For the purposes of this switch, I would like my existing investments to:

Include all my investments in CPP Funds*

Exclude all my investments in CPP Funds that have been opened

- The percentage allocations in the column below must add to 100%
- Where the percentage allocation does not add to 100% the remaining portion to be switched will be allocated to the Conservative Fund.

Investment Options	Switch my existing investments in to the following investment option(s)%
Cash Fund	
Conservative Fund	
Balanced Fund	
Growth Fund	
Total	100%

**Important notes relating to switching existing investments out of CPP:*

- If you are terminating your investment in a CPP Fund(s) you will not receive the benefit of any capital protection. See the Westpac KiwiSaver Scheme Investment Statement for further information relating to withdrawals prior to the maturity of a CPP Fund.
- Any contributions invested in your transaction account awaiting the opening date of the next CPP Fund, will be re-distributed as soon as practicable in accordance with your revised investment strategy, set out in the table above.

If you wish to switch your investments in some but not all CPP Funds you will need to contact the Manager on **0508 972 254**

Please also complete section C if you would like to change the investment strategy for all future contributions as well as your existing investments



C: Future Contributions

I would like to invest 100% of my future contributions into the CPP

OR

I would like to invest my future contributions as indicated in the table below:

- The percentage allocations in the column below must add to 100%
- Where the percentage allocation does not add to 100% the remaining portion to be switched will be allocated to the Conservative Fund.

Investment Options	Invest my future contributions into the following investment option(s)%
Cash Fund	
Conservative Fund	
Balanced Fund	
Growth Fund	
Total	100%

Subject to the applicable minimum balance required in your transaction account, the contributions in your transaction account not yet invested in your current investment strategy will be re-distributed as soon as practicable in accordance with your revised investment strategy, set out in the table above.

D: Authorisation

Note: A parent or guardian must sign on behalf of a member under the age of 18 years. An Attorney signing on behalf of the member must complete a certificate of non-revocation of Power of Attorney.

Signature	Date:	DAY / MONTH / YEAR
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If this form is being completed on behalf of a member under the age of 18 years, or by a Power of Attorney, that person must sign the following:

I, <small>FULL NAME</small> confirm that I am authorised to sign this form on behalf of the member named		
Signature	Date:	DAY / MONTH / YEAR

IMPORTANT: BEFORE SENDING US THIS FORM PLEASE CHECK

This form has been completed in full?

You have completed section D?

Please call us on **0508 972 254** between **8.30am** and **5.30pm**, Monday to Friday if you need any help completing this form.

Please return the completed form to:
The Westpac KiwiSaver Scheme,
PO Box 695, Wellington 6140

Investments made in the Westpac KiwiSaver Scheme do not represent bank deposits or other liabilities of Westpac Banking Corporation ABN 33 007 457 141, Westpac New Zealand Limited or other members of the Westpac group of companies. They are subject to investment and other risks, including possible delays in payment of withdrawal amounts in some circumstances, and loss of investment value, including principal invested. None of BT Funds Management (NZ) Limited (as manager), any member of the Westpac group of companies, The New Zealand Guardian Trust Company Limited (as trustee), or any director or nominee of any of those entities, or any other person guarantees the Westpac KiwiSaver Scheme's performance, returns or repayment of capital.



BT Funds Management (NZ) Limited is the scheme provider and Westpac New Zealand Limited is the distributor of the Westpac KiwiSaver Scheme.